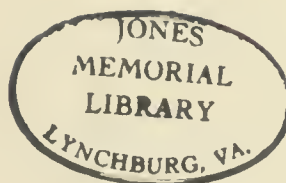




SWEET
BRIAR
COLLEGE



Special Edition
Summer 1987

Strategic Planning: What Is It?

Since April of 1986, Sweet Briar has been involved in the initial phases of a formal strategic planning process. Strategic planning is a comprehensive and continuous method of institutional management, which corporations and nonprofit organizations effectively use to reach a consensus, form realistic goals, and determine a reasonable course of action.

Sweet Briar's task force draws on the insight and expertise of the whole community: the Boards of Directors and Overseers, key administrators, faculty and student representatives, and a select group of Sweet Briar alumnae and parents. Their combined efforts will set directions for the College during the next three to five years. How and why Sweet Briar has adopted this particular approach to planning is the subject of this special issue of the Bulletin.

In the recent past, Sweet Briar's attention has focused on tangible problems, especially those with important financial implications. Top priority has been given to endowment, faculty salaries, and the academic program. The results have been good. In fact, Sweet Briar has achieved an enviable position in the 1980's. However, maintaining Sweet Briar's position in the years to come will require a fresh outlook and a different approach. To remain vital as a liberal arts college for women, Sweet Briar must begin to reevaluate its mission in the context of today's world.

The relation between the institution and the external environment is the main focus of Sweet Briar's strategic planning committees. The Environmental Scan Committee gathers external data pertinent to Sweet Briar's future. Simultaneously, the Issues Planning Committees assess the College's internal capacity to meet the needs of a changing world.

Matters that are objective and subjective, tangible and intangible, financial and attitudinal, comprise the agenda. Each committee deliberates at length, separating issues from nonissues and ranking its concerns according to the likelihood of their occurrence. As thorough and exhausting as

it sounds, the research and recommendations of the Environmental Scan and Issues Committees merely begin the process. Strategic planning is a comprehensive and cyclical approach to institutional development, occurring in five phases which repeat over a period of time.

Phase One: *A Review of Mission, Data Gathering for the Environmental Scan, Assessment of Internal Capability* — Representatives of all constituencies met in Colonial Williamsburg in September 1986 to begin the process of strategic planning. The meeting began with a review of the College's history and past planning efforts. President Fry provided conferees with a current definition of Sweet Briar's mission and goals. The President emphasized that the College would come around full circle to address her mission after the Environmental Scan and Issues Planning Committees had done their work.

As a rule, the strategic planning process is initiated and carried out by community volunteers working within the existing structure of administrative and faculty leadership. In Sweet Briar's case, members of the Boards of Directors and Overseers double as planning committee members. The Director of Admissions is a member of

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PHASE FIVE



- Sweet Briar continually checks the performance and progress of the Five-Year Plan. The strategic planning process continues as adjustments are made and new issues come into play.



PHASE FOUR

- The Steering Committee presents its Draft Outline of Mission, Goals, and the Five-Year Plan for general approval.
- The College proceeds to implement the Five-Year Plan.

the Enrollment Committee; the Dean of Student Affairs is a staff member on the Co-curriculum Committee, and faculty and student representatives serve on each of the planning committees. Everyone involved in the process reports back to their colleagues and/or staff on a regular basis. Student committee members bring appropriate matters to the Student Government Associa-

PHASE ONE

- A review of past planning efforts as Sweet Briar prepares to reevaluate its mission in the context of a rapidly changing world.
- The Environmental Scan Committee isolates trends (threats and opportunities) that will affect Sweet Briar in particular and women's education in general.
- The Issues Planning Committees assess Sweet Briar's internal capabilities, identifying strengths and weaknesses in the areas of enrollment, academics, co-curricular activities, finance, and facilities.



PHASE TWO

- After the Environmental Scan is completed, the Issues Planning Committees reconsider the College's strengths and weaknesses in light of external threats and opportunities. Various scenarios are drawn up and ranked according to their feasibility. Those given priority are referred to as "critical issues."
- Each Issues Committee then reports to the Planning Steering Committee which in turn integrates and ranks the critical issues presented.

PHASE THREE



- The Steering Committee determines what issues the College must act on in the near future and outlines Sweet Briar's Five-Year Plan.

tion, and faculty report to regular College committees and faculty meetings. This exchange establishes credibility, a sense of legitimacy that builds confidence and strengthens the institution.

Although strategic planning is a community project, getting the process in motion often requires some outside advice. A demographics specialist, Dr. Harold

Hodgkinson, was invited to speak at the Williamsburg meeting. Also present was Barbara Snelling, president of Snelling, Kolb and Kuhnle, who is serving as consultant to Sweet Briar and President Fry during the planning process.

Phase Two: *The Analysis of Critical Issues* — The Environmental Scan Committee looks at social, economic, political, demographic, and technological trends that are relevant to Sweet Briar and women's education. Their findings can be broken down into two categories: external threats and external opportunities.

The Issues Planning Committees examine Sweet Briar's strengths and weaknesses in the academic program, co-curricular activities, enrollment, finance, and facilities. When the work of the Environmental Scan Committee is completed, the Issues Committees consider all the *critical issues* (i.e., external threats and opportunities as well as internal strengths and weaknesses) in each area.

During Phase Two of the process, each Issues Committee reports in writing to the Planning Steering Committee, which in turn integrates and ranks the information presented. The Steering Committee is then in a position to address the College's mission. Throughout the spring of 1987, as the Issues Committees have submitted their reports, the Planning Steering Committee has been drafting a five-year outline of actions to be taken with recommended funding sources.

Phase Three: *The Integration of Recommendations* — By the fall of 1987, the Planning Steering Committee will be ready to present its draft outline on "Mission, Goals, and the Five-Year Plan." The main challenge before the Steering Committee is to isolate issues the College can do something about and to formulate a corresponding plan of action.

Phase Four: *Implementation* — Once the Steering Committee's Five-Year Plan is reviewed and approved by the Boards of Directors and Overseers, the College will proceed to carry out the strategic steps contained in the document.

Phase Five: *Evaluations* — Phase Five is an on-going evaluation of performance and progress, updating of the Environmental Scan, and a review of implementation procedures. Issues that were not given priority earlier in the process may be reintroduced at this point. Phase Five is both the end of the first cycle of strategic planning and the beginning of the next cycle.

No other method of institutional management can match strategic planning in scope and flexibility. Such a study is bound to reveal discrepancies between Sweet Briar's current offerings and the needs of a changing world. In some cases the College will be able to make adjustments, in some cases not. The point is that each decision will be a well-informed decision; the College will not be fooling itself about its mission in the years to come.

Strategic planning at Sweet Briar is currently in its most intensive phase. The Planning Steering Committee will prepare its draft outline on "Mission, Goals, and the Five-Year Plan" over the summer for presentation in September. Alumnae will be updated periodically as the process continues.



Strategic
Planning:
An Interview with
Allie Stemmons Simon '63,
Chair of the Strategic
Planning Steering
Committee



"Sweet Briar has changed. It cannot be the place it was when I was a student. From a personal standpoint, I sometimes long for the good old days, but I recognize the fact that current students are being educated for the 1990s, not 1963. My generation had the option of going to work, of having a career. In contrast, my daughters went to school knowing it was going to be necessary to support themselves. They did not expect to come home after college, marry the boy next door, have 2.9 children, and join the Junior League. We are looking at a brave new world.

"When it came to setting priorities, some items or issues — very near and dear to people's hearts — were pushed way down to the bottom of the list. Even so, we managed to reach a consensus without things degenerating into a real hair-tearing cat fight. The process forces you to make necessary compromises."

"We began the strategic planning process by saying that we were going to delve as deeply as possible into every facet of Sweet Briar College. We've been asking questions. For instance, we want to know if our academic program is strong enough. If not, why not? We want to learn more about our reputation, about our place in the world. It's an evolutionary process and certainly an educational one. We're learning as we go along.

"What amazes me is the degree to which everyone has been able to put self-interest aside and focus strictly on the College, on what's best for Sweet Briar. You have to remember that each committee member is representing a different constituency and, at times, a different generation. As a result, we've had a remarkable airing of views and some very enlightening discussions.

"The thing about strategic planning is that you are dealing, not only with your own institution, but with whatever else in the world comes to bear on that institution, both directly and indirectly. The most obvious example is the demographic data. The baby boom is over. Our applicant pool is getting smaller and smaller. We need to target — more carefully than ever before — those young women who are right for Sweet Briar. Demographics constitute an outside pressure which we will use, if we can, to our advantage. If not, we must at least determine how to live with it. A lot of strategic planning involves learning to live with issues we can't control.

"The computer issue is another good example of an outside influence which affects our planning. New technologies have drastically altered the course of education in the past fifteen years. No question about that. But the impact of computers extends beyond the academic

program. It was bad enough having stereos and blow dryers running in the dorms. Now we're looking at the probability of personal computers plugged in on top of everything else! As a result, we're having to face up to some very costly electrical renovations in our older buildings.

"It would be easy for us to sit down and make up a wish list but that wouldn't be realistic. For example, I have lists — pages and pages long — of building projects. Which took priority? Not a single one. As it turned out, before we could do anything else, we needed to have a warehouse. The College has never had a central shipping and receiving depot for equipment, construction materials, and everything else coming onto the campus. It's been a real problem so far as purchasing and record keeping is concerned. Who wanted the warehouse? Nobody. But it's going to save us a lot of time and money down the line and it's under development right now. Very unromantic stuff.

"As far as Sweet Briar's mission goes, well, we're not looking at a radical change. The mission statement in the current catalog is about 10 or 12 years old and it could use a little polish. The new statement will be stronger but the College's basic priorities will remain intact. It's healthy — not at all threatening — to review your mission statement periodically. I compare it to the process of updating a will. Ideally, that's something you should do about every five years. My husband and I took a look at ours again just recently and we were amazed at how much our circumstances had changed in a short time. When the kids were little, we made very obvious provisions and plans for their future. These days we have different considerations and a new set of options."

Strategic Planning: Committees and Issues



At first glance, the philosophy, structure, and vocabulary of strategic planning can be somewhat mind-boggling. But once you understand the phraseology, the method becomes more and more comprehensible. "Phases" mean only that there is a checklist and timetable involved. Committee work is committee work — coffee and aspirin — regardless of the task at hand. Environmental "threats" include certain realities we would all prefer to ignore: The baby boom is over; women and other minorities are still disadvantaged in the workplace; kids would rather watch *Jaws* I, II, III, and IV than read one chapter in *Moby Dick*; does anyone really understand global economics?

There is a strong tradition of innovation at Sweet Briar — broadening the curriculum, expanding the facilities, and meeting the needs of new generations of young women. The College's current strategic planning effort builds on this tradition.

By looking outward, Sweet Briar expects to learn what sets it apart from other colleges. We have always known the College is exceptional; at the end of the process we will know exactly where it excels.

In looking at individual strategic planning committees, it's important to keep in mind that their work is related. The mission of the College should be reflected in its academic offerings, financial aid programs, renovation plans, admissions procedures, and public relations efforts. The strategic planning process will result in a clear understanding of the ways Sweet Briar will use its resources to achieve consistency and coherence.

The Strategic Planning Steering Committee: Members of the Steering Committee guide the planning process, receiving all



reports from both the Environmental Scan Committee and the Issues Committees. Their responsibility is to identify the issues most critical to Sweet Briar's future and to recommend the appropriate direction and actions to be taken. The Steering Committee reports to the Boards of Directors and Overseers.

The Steering Committee has twelve members, including the five chairmen of the Issues Committees. The student representative is also the Secretary of the Student Government Association.

The Chairman of the Steering Committee works with the Chairmen of the Environmental Scan and Issues Committees in devising work plans and schedules.

The Environmental Scan Committee: The Scan Committee's first responsibility was to determine the scope and depth of data measuring demographic, social, economic, political, educational, and technological trends. Using the data collected, the Committee constructed possible

STRATEGIC PLANNING CALENDAR

PHASES I & II

September 1986

Williamsburg Meeting

Participants:

Boards of Directors and
Overseers

Steering Committee
Environmental Scan
Committee

Issues Planning Committees

Topics:

Mission, Past Planning
Efforts

Sweet Briar's Concerns
for the Future

Forecasting the Future
Planning Process

Women's College Trends

Enrollment: Market Analysis

Enrollment: Critical Issues

Facilities: Critical Issues

November 1986

Participants:

Boards of Directors and
Overseers

Steering Committee
Environmental Scan
Committee Report

Issues Planning Committees

Topics:

Environmental Scan Data
& Issues Progress
Report

Academic Data and Issues
Co-curriculum Data &
Issues

January/February 1987

Enrollment Planning
Committee Meeting

Academic Program Plan-
ning Committee Meeting

Co-curriculum Planning
Committee Meeting

Topics:

Critical Issues

scenarios for Sweet Briar's future. Critical issues arising out of each situation were identified and ranked according to their potential impact, probability, and urgency. This work was then presented to the Steering Committee in the form of significant trends and implications. For example, in the near future there will be more "second generation" college students than ever before. These students are more likely to attend private colleges. But, diminishing federal support for public and private education will continue to have adverse implications for middle-income parents, making a private education for their children increasingly difficult to finance.

The Issues Planning Committees: The five Issues Committees review the data presented by the College's administration and the Environmental Scan Committee

- **Academic Program** and use that information
- **Co-curriculum** in determin-
- **Enrollment** ing Sweet
- **Facilities** Briar's
- **Finance** strengths and weaknesses.

They decide what issues within their respective areas should be addressed by the Steering Committee and recommend what actions should be taken. Members of these committees are invited to attend sessions of the Steering Committee in order to obtain information essential to their deliberations. The Issues Planning Committees have submitted written summaries of their conclusions to the Steering Committee.

Membership of Strategic Planning Committees

Ex officio members of all Planning Committees:

Nenah E. Fry, *President*

Allison Stemmons Simon '63, *Chairman of Steering Committee (Director)*

C. Wrede Petersmeyer, *Chairman of Boards*



Steering Committee

Allison Stemmons Simon '63, *Chairman (Director)*

Alice Cary Farmer Brown '59 (*Director*)

Walter H. Brown, *Chairman of Finance Committee (Director)*

F. Hudnall Christopher, Jr., *Chairman of Environmental Scan Committee (Director)*

E. Henry Groppe, Jr. (*Overseer*)

Peggy Sheffield Martin '48, *Chairman of Enrollment Committee (Director)*

John R. McClenon (*Professor*)

Marvin B. Perry, Jr., *Chairman of Academic Committee (Overseer)*

Judy Greer Schulz '61 (*Overseer*)

Philip A. Sellers, *Chairman of Facilities Committee (Overseer)*

Stephanie John Wilt '88 (*Student*)

Kathryn Prothro Yeager '61, *Chairman of Co-curriculum Committee (Overseer)*

F. Mark Whittaker (*Staff*)



Environmental Scan Committee

F. Hudnall Christopher, Jr., *Chairman (Director)*

E. Henry Groppe (*Overseer*)

Alice Cary Farmer Brown '59 (*Director*)

Subcommittee:

Brent M. Shea, *Chairman (Professor)*

David A. Johnson (*Professor*)

Marilyn A. Ross (*Professor and Staff*)

Pamela L. Whittaker (*Staff*)

Issues Planning Committees



Academic

Marvin B. Perry, Jr. (Chairman (Overseer))
Wendy C. Birtcher '84 (Overseer)
E. Henry Groppe, Jr. (Overseer)
Milan E. Hapala (Professor)
Gwen Speel Kaplan '60 (Overseer)
James T. Metz, Jr. (Parent)
Kathleen M. Metz (Parent)
Anna Chao Pai '57 (Overseer)
Eden Linda Rue '89 (Student)
Michael D. Richards (Professor)
E. Elaine Schuster '58 (Overseer)
A. Robin Bowers (Staff)



Co-curriculum:

Kathryn Prothro Yeager '61, Chairman (Overseer)
Marshalyn Yeargin-Allsopp '68 (Overseer)
M. Elizabeth (Beth) Conner '86 (Overseer)
Frank S. Goodman (Parent)
Carol L. Goodman (Parent)
David A. Johnson (Professor)
Julia Gray Saunders Michaux '39 (Overseer)
Kathleen Papadimitriou '84 (Alumna)
Judy Greer Schulz '61 (Overseer)
Stephanie John Wilt '88 (Student)
Robert H. Barlow (Staff)



Enrollment:

Peggy Sheffield Martin '48, Chairman (Director)
Jody Raines Brinklev '57 (Overseer)
Cathleen R. Brooke '85 (Overseer)
F. Hudnall Christopher, Jr. (Director)
Libby Trueheart Harris '49 (Overseer)
Julia Mills Jacobsen '45 (Staff)
Worth A. Kendall (Parent)
Anne W. Kendall (Parent)
Fran Griffith Laserson '70 (Overseer)

John R. McClenon (Professor)
Stephanie Sprouse '88 (Student)
Ade Jones Voorhees '46 (Alumna)
Kenneth S. White (Overseer)
Alice H. Love (Staff)
Ann Morrison Reams '42 (Staff)



Facilities:

Philip A. Sellers, Chairman (Overseer)
Sarah Belk Gambrell '39 (Director)
Lyn Dillard Grones '45 (Overseer)
George T. Harrison (Overseer)
Helen Murchison Lane '46 (Alumna)
Elizabeth (Ici) F. Ollison '89 (Student)
Lee Piepho (Professor)
Thomas N. Connors (Staff)



Finance:

Walter H. Brown, Chairman (Director)
Susan E. Beers (Professor)
Sarah Porter Boehmler '65 (Overseer)
Alice Cary Farmer Brown '59 (Director)
Joseph H. Davenport, Jr. (Director)
Philip Greer (Parent)
Nancy Greer (Parent)
Sara Finnegan Lycett '61 (Overseer)
Elizabeth (Liz) Ann Stoebner '87 (Student)
Thomas N. Connors (Staff)
F. Mark Whittaker (Staff)



Philip Sellers and Tom Connors

February 1987

Facilities and Finance Issues Committee Meeting

Topics:
Facilities Data and Issues
Finance Data and Issues

March 1987

Steering Committee Meeting

Topics:
Ranking Issues
Drafting Recommendations
Defining Mission and Five-Year Plan

PHASE III

April 1987

Participants:
Boards of Directors and Overseers
Steering Committee
Issues Planning Committees

Topics:
Steering Committee Draft Report
Critical Issues
Recommendations
Mission and Five-Year Plan
Interim Report

Summer 1987

Steering Committee Meeting

Topic:
Completion of Planning Report

PHASE IV

September 1987

Away Board Meeting

Participants:
Boards of Directors and Overseers
Steering Committee
Issues Planning Committees

Topics:
Presentation and Approval of Mission, Strategic Plan, and Documents
Board Development
Board Procedures

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Lynchburg
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The need for a permanent guest house for visitors to Sweet Briar's campus has been identified as a top priority by the College. At the same time, the College also plans the renovation of its five oldest residence halls. Thus, the new guest house will also provide housing for students, if necessary, while the residence hall project is underway.

The conceptual drawings and floor plans call for a twelve-room inn to be built next to the Wailes Student Center. In addition to guest accommodations, there will be a Reception Center with a lobby and conference room.

The project budget is \$550,000. Opportunities are available for donors to name areas within the building, including the Reception Center.



◆ Sweet Briar's guest house will be named *The Florence Elston Inn* through the generosity of Florence Woelfel Elston Beemer '21. Set in a wooded area, the two-story brick building is designed to be consistent with Sweet Briar's traditional architecture.